# SurveyToGo

## Enterprise

# PDA User Guide

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# Chapter 1 – Installing SurveyToGo on the mobile device

## Installation

SurveyToGo can be installed on your Windows Mobile device in 2 ways:

1. Through the SurveyToGo Designer application
2. Directly by using a CAB file.

The preferred way to install SurveyToGo is by using the Designer.

## Installing SurveyToGo from the Designer:

In order to install SurveyToGo from the designer, please follow these steps:

1. Open up the Designer
2. Login using your user name and password.
3. Click the "Tools > Install To Mobile Device" option
4. Follow the onscreen instructions.

**Note:** SurveyToGo requires the .NET Compact Framework and SQL Mobile on your device. When installing from the designer, all necessary components are installed along with SurveyToGo.

## Installing SurveyToGo directly by using a CAB file:

SurveyToGo requires the following components in order to run correctly:
1. .NET Compact Framework v2.
2. SQL Mobile Edition.
To download and install these components, please refer to:
www.microsoft.com/mobile

Please make sure that these component are installed prior to following these steps (note: when using the Designer to install SurveyToGo, there is NO NEED to install any of these components as the Designer installs them for you):

1. Transfer the .CAB file to your device by using the File Explorer.
2. Use the File Explorer on your device to locate the .CAB file, then tap the file once to start the installation.

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# Chapter 2 – Working with the system

## Logging in

The first screen of the application is the login screen.

In this screen you should enter your login details as you have received them from the system administrator and tap the Login button to login.

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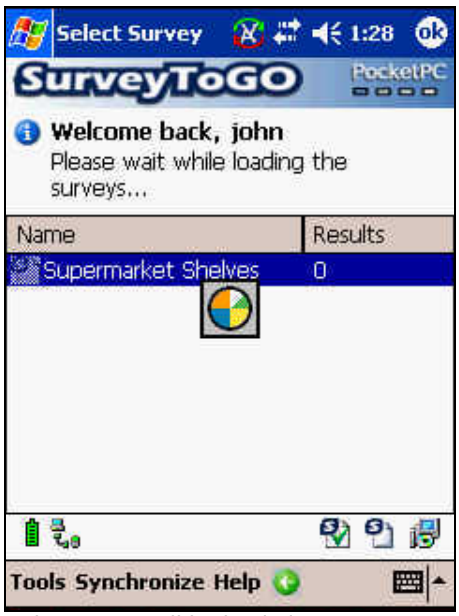
## Surveys List screen

After successfully logging into the system, you will be transferred to the survey list screen, where you can view a list of all the available surveys and their current results on the device.

Select the desired survey and tap it >>>




The survey will be loaded

In order to select the desired survey, simply tap once on the survey.

**Important:** Loading the survey for the first time can take a while depending on the length and size of the survey. This is a normal condition. Simply wait for the wait cursor to stop spinning.

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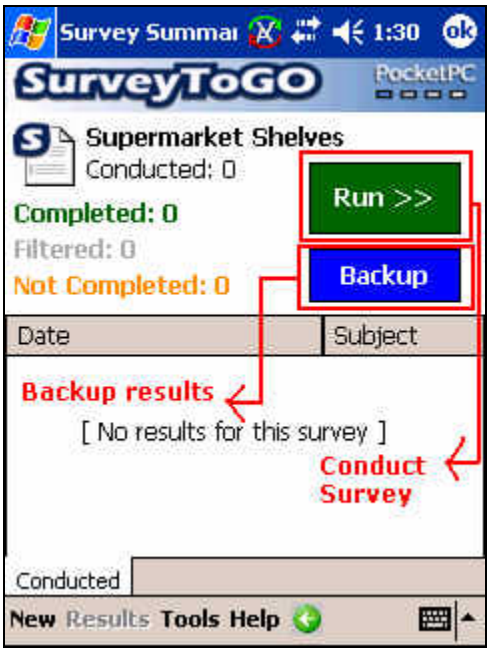
## Survey details screen

After loading the survey you will reach the following survey details screen. From this screen you can start conducting surveys.




In order to start conducting a new survey, simply tap the big green Start button, and the screen will turn to the conducting screen.

## Backing up the data

In order to backup the collected data to the attached external backup card, tap the big blue Backup button.

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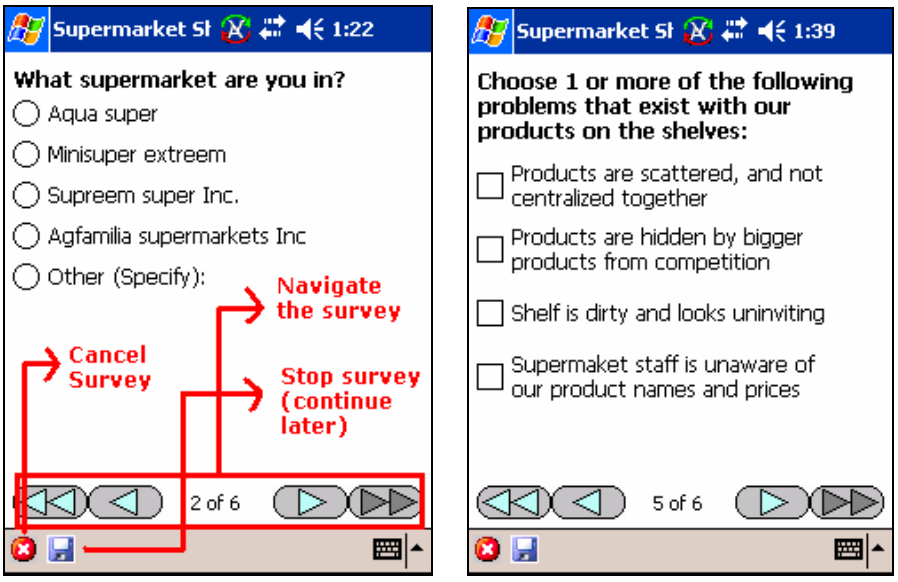
## Conducting the survey

Conducting the survey consists of reading the question, entering the proper answer, and navigating the survey as needed. 2 sample screens from a sample survey are shown below. Notice the navigation bar which is used to navigate through the survey as needed.


Supermarket Sl 1:22
What supermarket are you in?
Aqua super
Minisuper extreem
Supreem super Inc.
Agfamilia supermarkets Inc
Other (Specify):
Navigate the survey
Cancel Survey
Stop survey (continue later)
2 of 6
Supermarket Sl 1:39
Choose 1 or more of the following problems that exist with our products on the shelves:
Products are scattered, and not centralized together
Products are hidden by bigger products from competition
Shelf is dirty and looks uninviting
Supermaket staff is unaware of our product names and prices
5 of 6

To cancel the survey and go back to the previous screen, you can tap the red cancel button as shown in the above figure.
You can also stop conducting the survey to later continue working on it by pressing the blue disk button.

Once you have answered all the questions in the survey, the survey is marked as completed and you are redirected back to the previous screen, the Survey Details screen. Notice the list of results is now updated with the new survey result:

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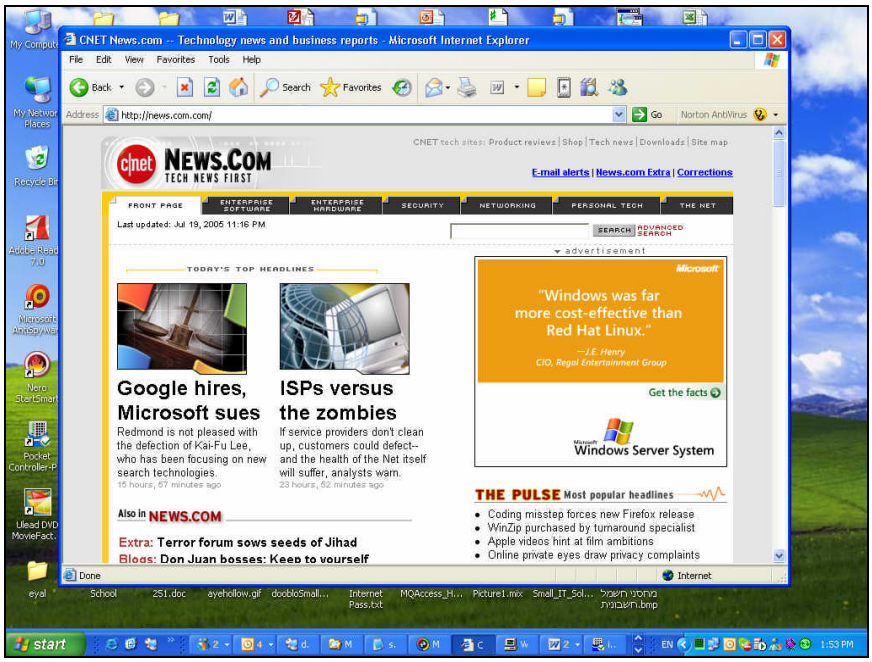
# Chapter 3 – Connecting the device to the computer for the first time

## **Important:** Do not connect the cradle to the computer until instructed to do so!

### Step 1 - Preparations

Before installing, please make sure of the following:

1. Your personal computer is switched on.
2. Your internet connection is turned on and is working. To check, open up internet explorer and go to www.news.com if the site loads up, your internet connection is turned on & working.

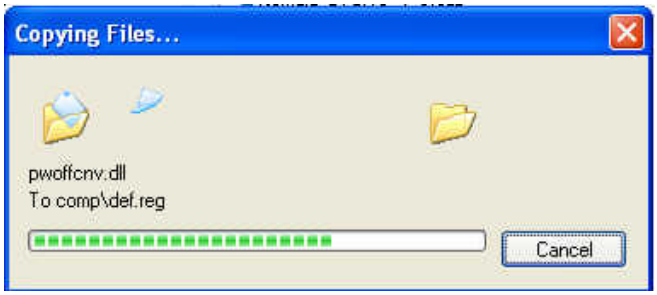

CNET News.com -- Technology news and business reports - Microsoft Internet Explorer
NEWS.COM
TECH NEWS FIRST
Google hires, Microsoft sues
ISPs versus the zombies
"Windows was far more cost-effective than Red Hat Linux."
Windows Server System
THE PULSE Most popular headlines
Coding misstep forces new Firefox release
WinZip purchased by turnaround specialist
Apple videos hint at film ambitions
Online private eyes draw privacy complaints
Extra: Terror forum sows seeds of Jihad

## Step 2 – ActiveSync installation

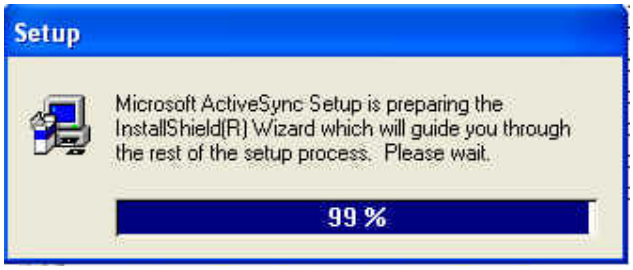
ActiveSync allows for connecting your device to your personal computer. To install ActiveSync, please do the following:

1. Insert the SurveyToGo installation CD to your CD/DVD drive.
2. Run the Setup.exe file from your CD by doubling clicking the Setup.exe file located on the CD. The following screens will show up:

and right after that:




Then this one….


Setup
Microsoft ActiveSync Setup is preparing the InstallShield(R) Wizard which will guide you through the rest of the setup process. Please wait.
99 %

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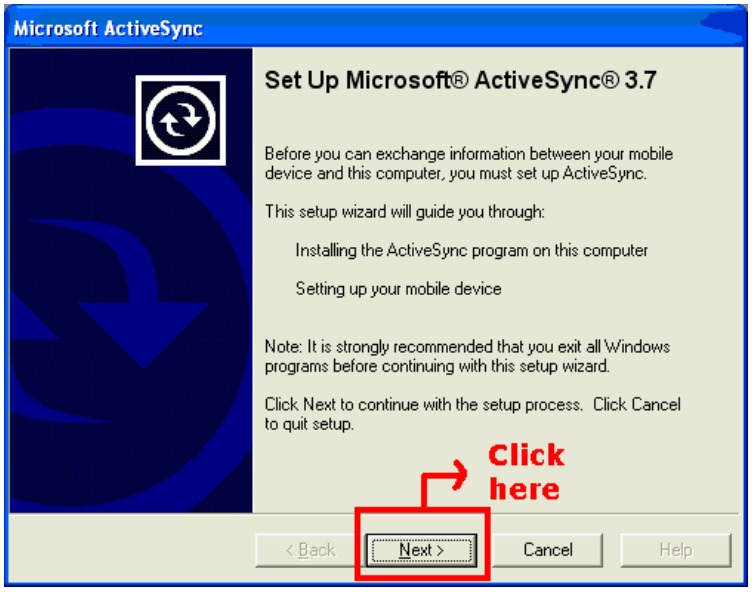
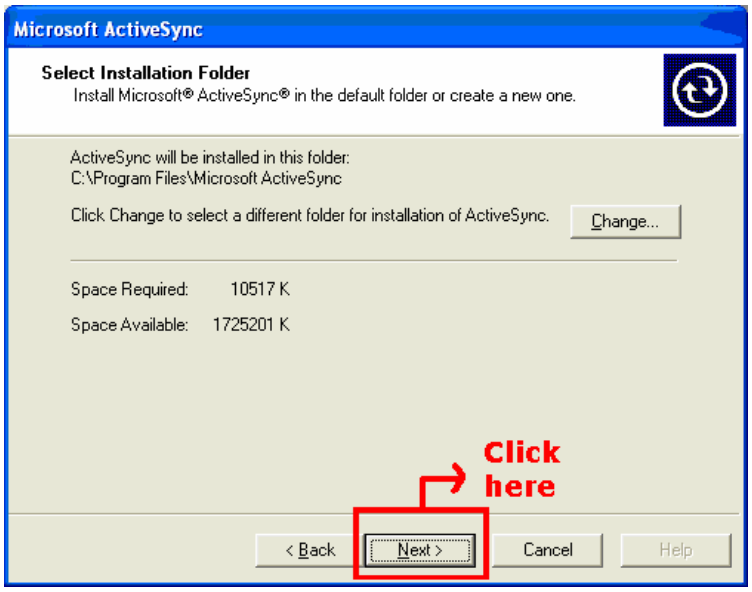
3. After a few seconds the following screen will appear. Press the Next button:


Microsoft ActiveSync
Set Up Microsoft® ActiveSync® 3.7
Before you can exchange information between your mobile device and this computer, you must set up ActiveSync.
This setup wizard will guide you through:
Installing the ActiveSync program on this computer
Setting up your mobile device
Note: It is strongly recommended that you exit all Windows programs before continuing with this setup wizard.
Click Next to continue with the setup process. Click Cancel to quit setup.
Click here
< Back
Next >
Cancel
Help

Then press Next in the following screen as well:


Microsoft ActiveSync
Select Installation Folder
Install Microsoft® ActiveSync® in the default folder or create a new one.
ActiveSync will be installed in this folder:
C:\Program Files\Microsoft ActiveSync
Click Change to select a different folder for installation of ActiveSync.
Change...
Space Required: 10517 K
Space Available: 1725201 K
Click here
< Back
Next >
Cancel
Help

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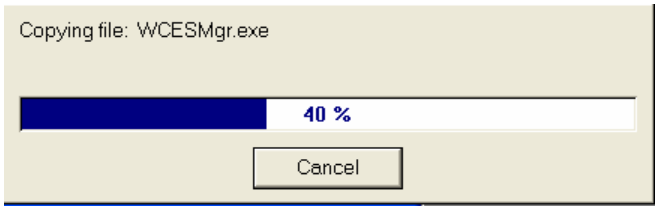
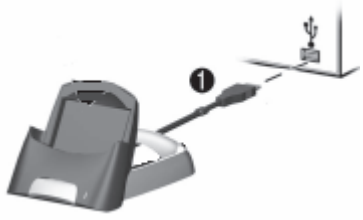
4. The computer will start showing a percentage bar. Please allow the computer to go all the way up to 100%.




5. Once 100% has been reached, you should see the following screen. **Do not press any key!**:

Get Connected
Get Connected
To connect your device to this PC:
1. Connect the cable to the PC
2. Turn on the device
3. Place the device in its cradle
ActiveSync should automatically detect your device.
If your device is not automatically detected, click Next.
If you are using infrared (IR), click Help.
< Back
Next >
Cancel
Help

6. Connect the cradle of the device to an empty USB socket.



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7. Connect the cradle to the electrical plug point:

8. Put the device onto the cradle:

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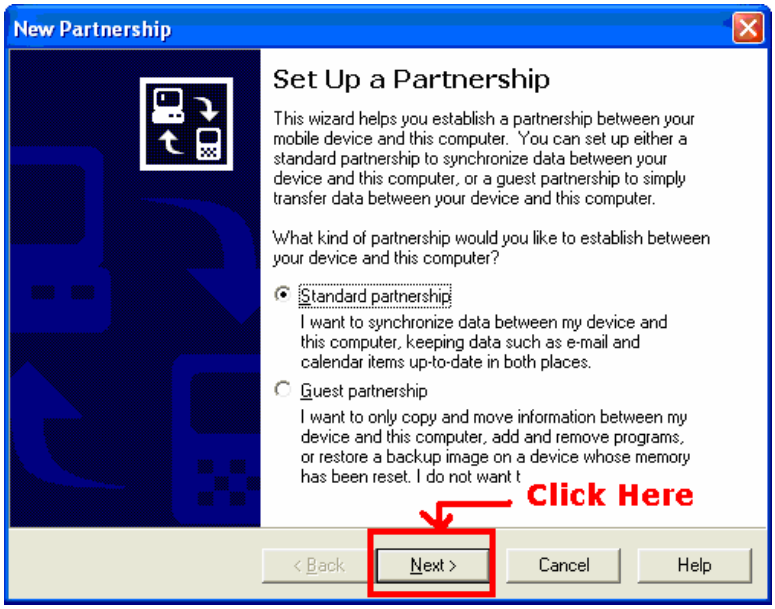
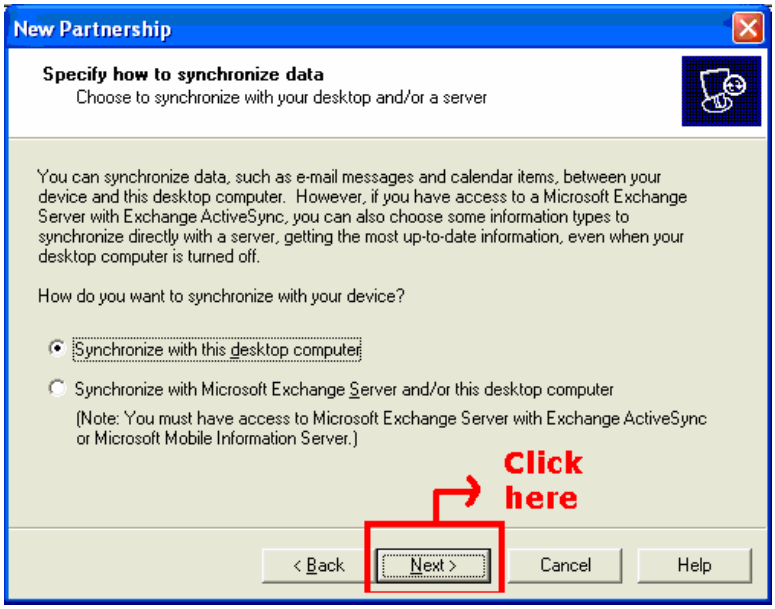
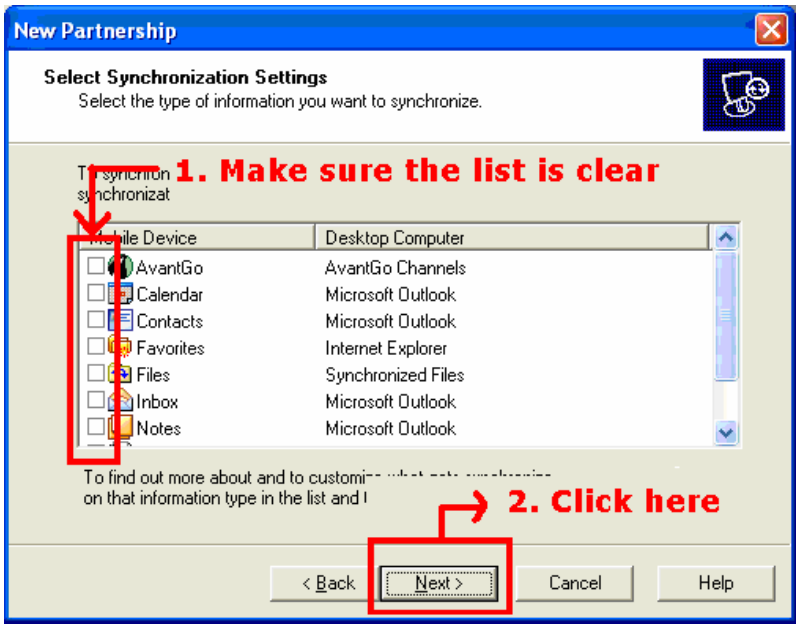
9. After a few seconds to following screen will appear. Press the Next button


New Partnership
Set Up a Partnership
This wizard helps you establish a partnership between your mobile device and this computer. You can set up either a standard partnership to synchronize data between your device and this computer, or a guest partnership to simply transfer data between your device and this computer.
What kind of partnership would you like to establish between your device and this computer?
Standard partnership
I want to synchronize data between my device and this computer, keeping data such as e-mail and calendar items up-to-date in both places.
Guest partnership
I want to only copy and move information between my device and this computer, add and remove programs, or restore a backup image on a device whose memory has been reset. I do not want t
Click Here
< Back
Next >
Cancel
Help

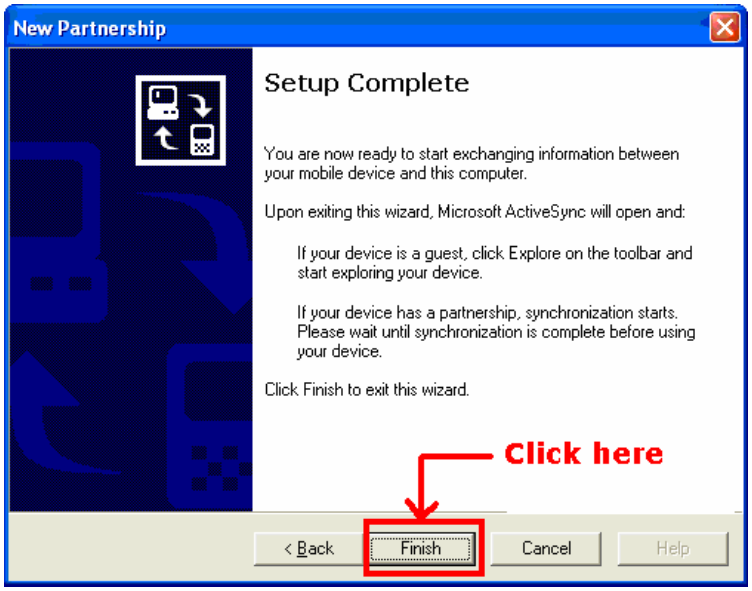
10. Press Next once more:


New Partnership
Specify how to synchronize data
Choose to synchronize with your desktop and/or a server
You can synchronize data, such as e-mail messages and calendar items, between your device and this desktop computer. However, if you have access to a Microsoft Exchange Server with Exchange ActiveSync, you can also choose some information types to synchronize directly with a server, getting the most up-to-date information, even when your desktop computer is turned off.
How do you want to synchronize with your device?
Synchronize with this desktop computer
Synchronize with Microsoft Exchange Server and/or this desktop computer
(Note: You must have access to Microsoft Exchange Server with Exchange ActiveSync or Microsoft Mobile Information Server.)
Click here
< Back
Next >
Cancel
Help

11. In the following screen, clear all the checkboxes (by pressing each selected checkbox once), then click Next




12. Press the Finish button on the following screen:


New Partnership
Setup Complete
You are now ready to start exchanging information between your mobile device and this computer.
Upon exiting this wizard, Microsoft ActiveSync will open and:
If your device is a guest, click Explore on the toolbar and start exploring your device.
If your device has a partnership, synchronization starts. Please wait until synchronization is complete before using your device.
Click Finish to exit this wizard.
Click here
< Back
Finish
Cancel
Help

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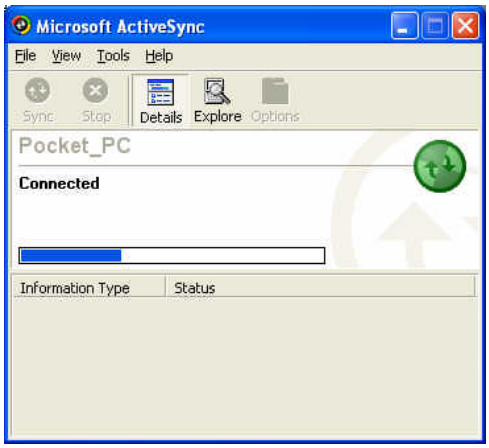
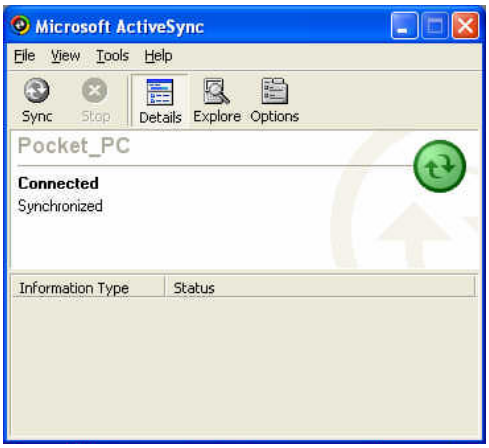
13. In a few seconds, the following screen will appear. Please do not continue until the green circle stops spinning.




spinning green circle >>>>




turns into a steady green circle

14. The first time installation procedure is now complete. To synchronize your results and surveys, please turn to Chapter 3 – Synchronizing results & surveys.

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# Chapter 4 – Synchronizing results & surveys

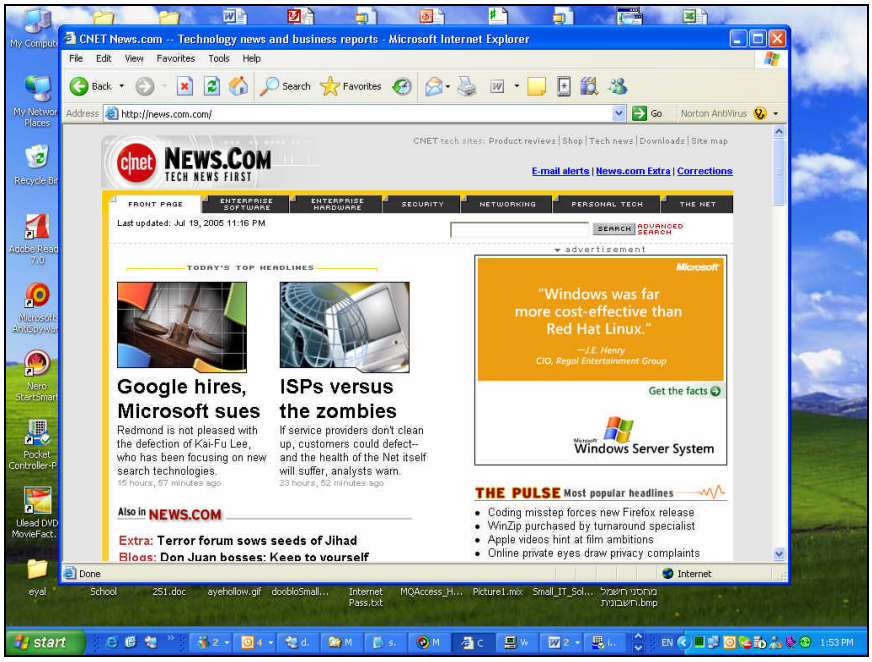
**Important:** **If this is the first time you are connecting the device to your personal computer, please do not continue and turn to Chapter 2 – Connecting the device to the computer for the first time.**

## Step 1 - Preparations

Before synchronizing the device, please make sure:

1. The personal computer is turned on.
2. There is a small circle, located on the bottom right corner of your desktop. The circle can be either green or gray.

3. Your internet connection is turned on and is working. To check, open up internet explorer and go to www.news.com if the site loads up, your internet connection is turned on & working.

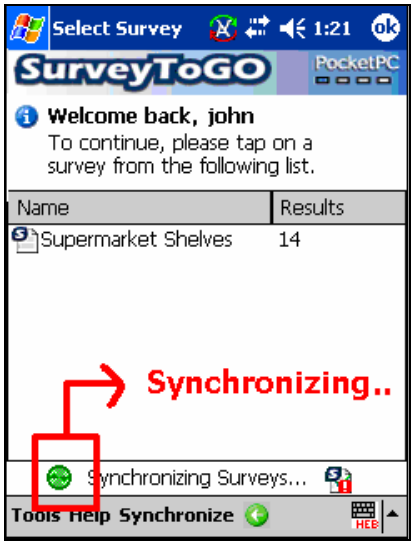

CNET News.com -- Technology news and business reports - Microsoft Internet Explorer
NEWS.COM
TECH NEWS FIRST
Google hires, Microsoft sues
ISPs versus the zombies
"Windows was far more cost-effective than Red Hat Linux."
Windows Server System
THE PULSE Most popular headlines

4.

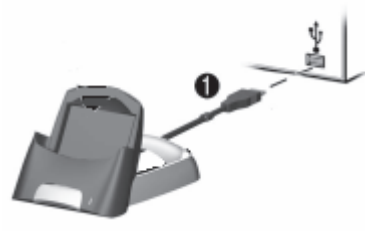
## Step 2 – connecting the device

To connect the device to the personal computer, please do the following:

1. In the device, make sure you are in the Survey List screen.




2. Plug the cradle to an empty USB slot



3. Connect the cradle to the electrical power plug

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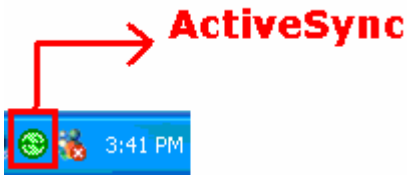
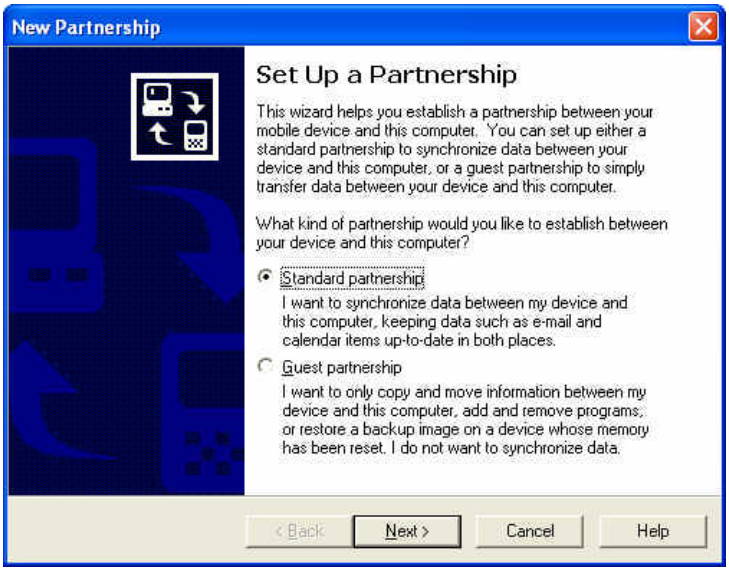
4. Put the device onto the cradle

5. Make sure the ActiveSync icon (located on the bottom right corner of your desktop) is green:




6. **<u>Important:</u> If you are seeing the following screen, Please turn to Chapter 2 – Connecting the device to the computer for the first time. Once completed, continue with the instructions.**


New Partnership
Set Up a Partnership
This wizard helps you establish a partnership between your mobile device and this computer. You can set up either a standard partnership to synchronize data between your device and this computer, or a guest partnership to simply transfer data between your device and this computer.
What kind of partnership would you like to establish between your device and this computer?
Standard partnership
I want to synchronize data between my device and this computer, keeping data such as e-mail and calendar items up-to-date in both places.
Guest partnership
I want to only copy and move information between my device and this computer, add and remove programs, or restore a backup image on a device whose memory has been reset. I do not want to synchronize data.
< Back
Next >
Cancel
Help

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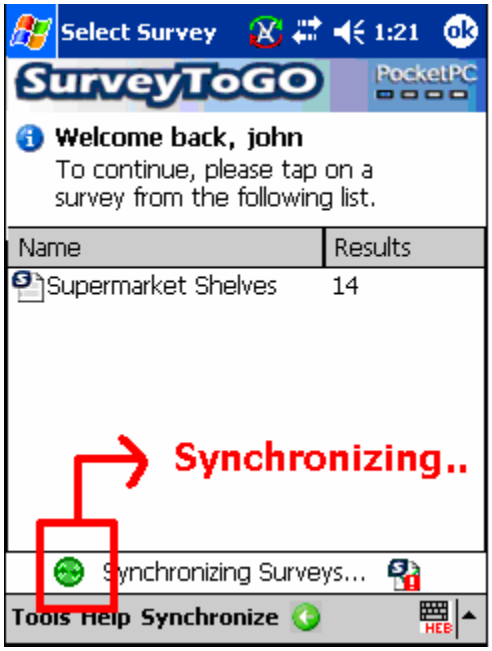
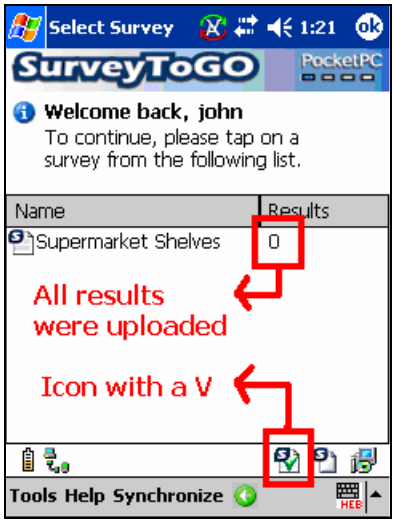
7. After a few seconds, the device will start synchronizing. A small green spinning circle will appear on the bottom of the device:




8. After a few minutes, the synchronization will be completed. The small green icon will stop spinning, and you will notice that all the survey have 0 results.




9. Once synchronization is complete, you can turn off the device and allow it to fully charge.

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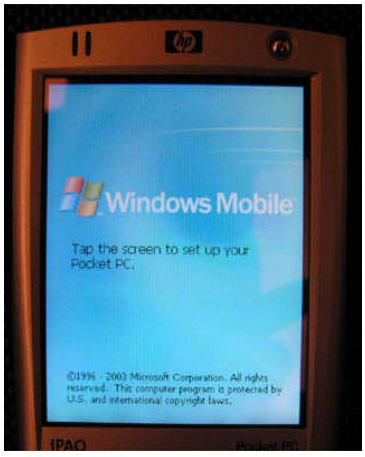
# Chapter 5 – Recovering from a hard-reset

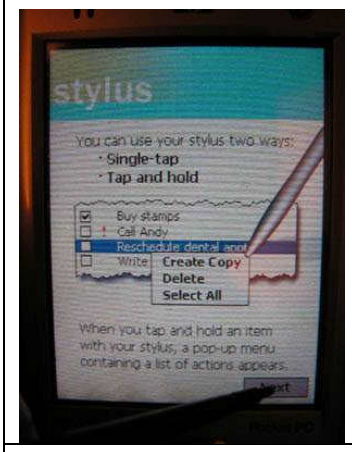
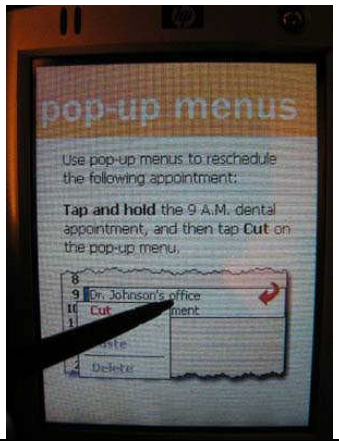
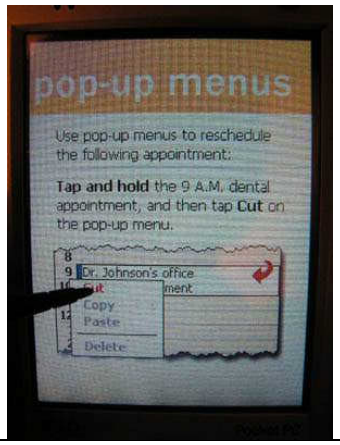
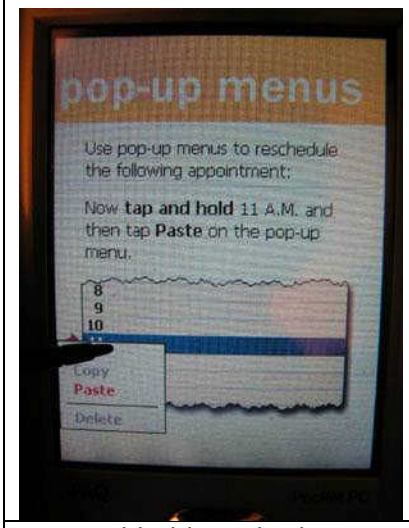
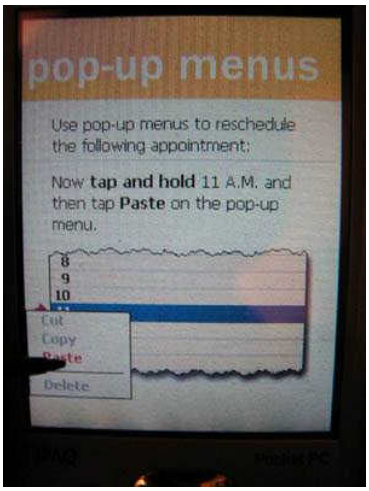
**Important:** **Do not perform the following actions unless your device has performed a hard-reset due to battery depletion or any other reason.**

## Step 1 – Device intialization

Before you can continue working with SurveyToGo, you will need to perform the following steps:

1. Make sure your screen is like the one depicted in figure 1
2. Perform the following steps one by one WITHOUT skipping any of them, you can refer to the on-screen instructions in addition to the following instructions:

| 1 | 2 | 3 |
|---|---|---|
|  | | |
| Tap the screen once | Tap once in the center of the cross | Keep tapping on the center of the cross until the screen changes. This might take 5 taps or more. |

| 4 | 5 | 6 |
|---|---|---|
|  |  |  |
| Click the Next button | Tap & hold on the white box until a menu appears. | Tap the Cut option |
| | | |
| 7 | 8 | 9 |
|  |  | |
| Tap and hold on the line marked "11" until a menu pops up. | Select Paste from the menu | Tap the Next button |

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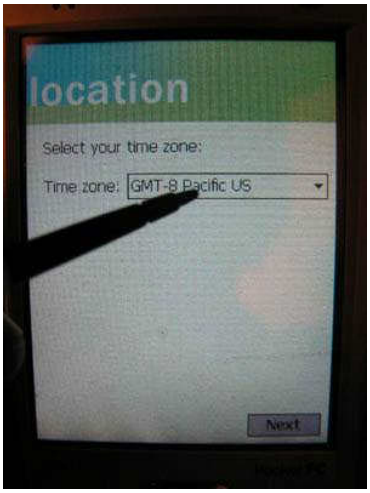
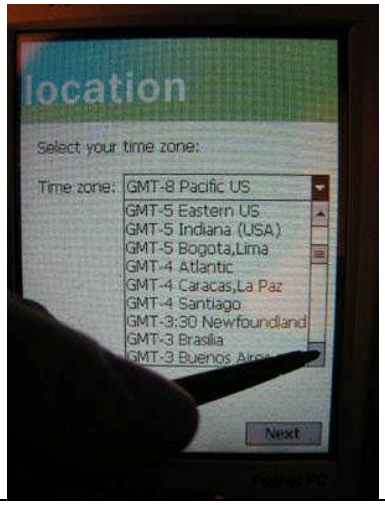
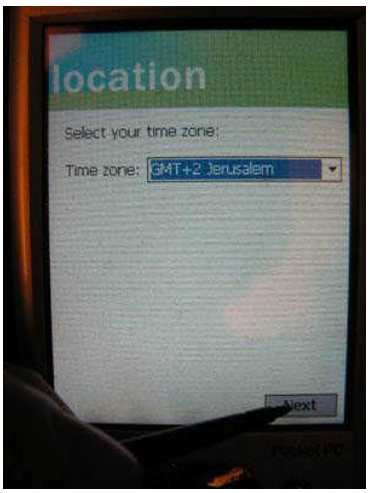
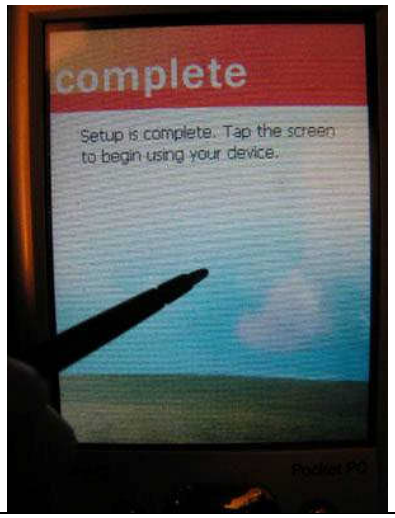
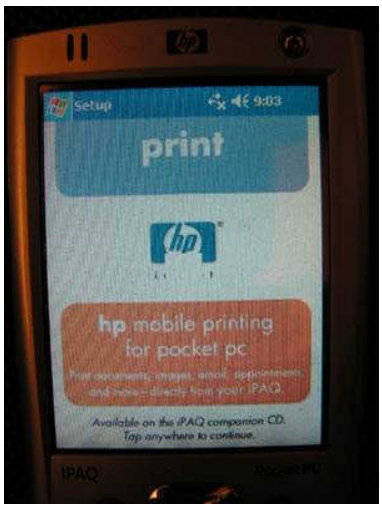
| 10 | 11 | 12 |
|---|---|---|
|  |  | |
| Tap the selection box | Scroll the screen until you find your time-zone | Select your country time-zone |
| | | |
| 13 | 14 | 15 |
|  |  |  |
| Click the next button | Tap the screen once more | In this screen, do not do ANYTHING. Simply wait ~20 seconds while the application installs itself. |

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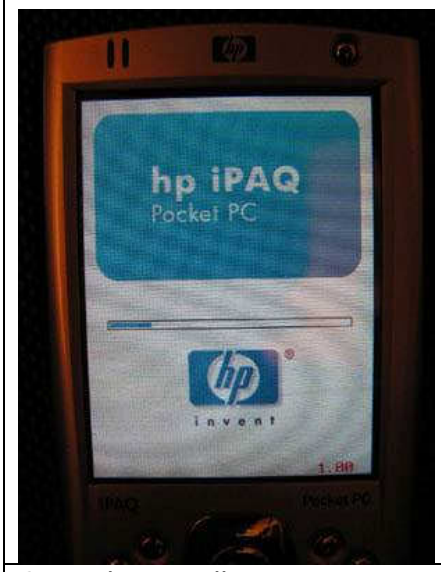
| | | |
|---|---|---|
| 16<br>  | | |
| Once the installation in finished, perform a soft-reset. After the device is done with the soft reset, SurveyToGo will load with the latest data. | | |

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# Chapter 5 – Updating the application

## Step 1 – General

SurveyToGo includes an auto-update process. This process checks to see if there are any updates to the application each time you synchronize the device.

## Step 2 – Automatically updating the application

Once you synchronize the device, the auto-update process will check for an update. If it finds one, the following message will be displayed:

To update the application, please follow the following instructions:

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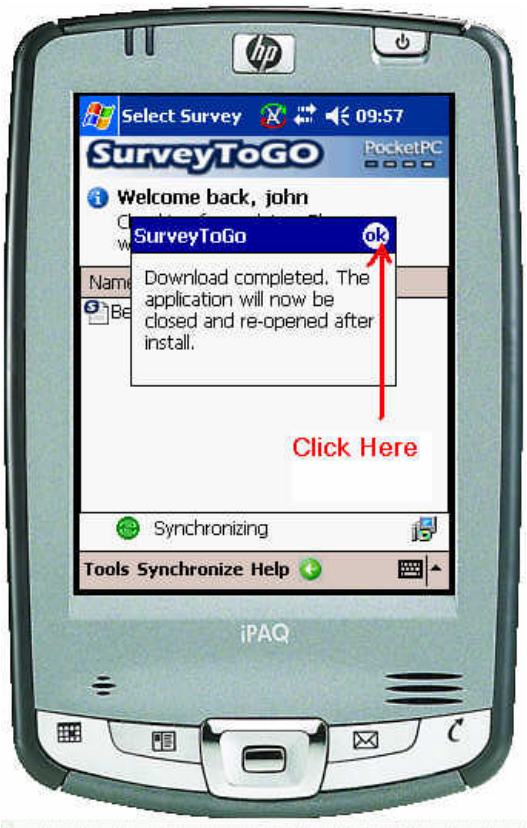
|---|---|
| |  |
| Press the YES button, and wait for approximately 30 seconds. | Once this message comes up, press the OK button and wait for application to close. |

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| 3 | 4 |
|---|---|
| | |
| **Do not do anything on this screen** | Once the application loads up again, simply login to complete the update process. |

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